Flowcharting Standards – Please use ONLY the symbols shown below, following these guidelines:
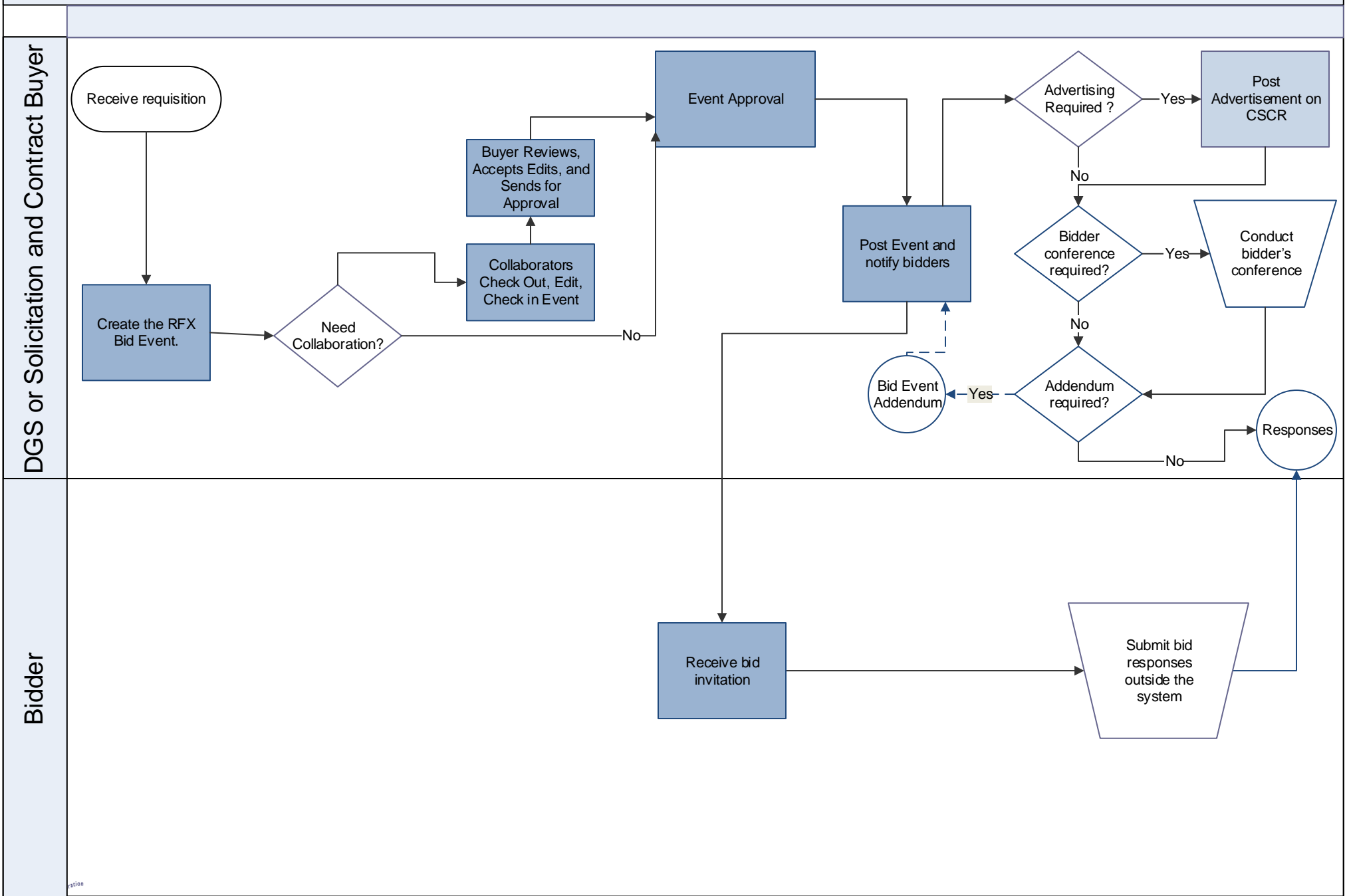
Template Key

Start/End - Indicates point at which the process begins or ends. Does not represent any activity.

Decision - shows a decision point, such as yes/no. Each path emerging from the diamond must be labeled with one of the possible answers.

System Task - Represents an individual step or activity in FI$Cal.

Manual Task - Represents an individual step or activity in the process that is made out of FI$Cal.

Input Documents – A paper document (or email) that is used for entering data in the process. For electronic data should be use the Interface shape.

Connector - On/Off-Page Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. Connectors are labeled with UPPER CASE letters.

Interface – Data conversion from one electronic system to another.

Batch Process - Represents a batch process within FI$Cal. Use a verb phrase (Process Invoice) NOT a noun phrase (Invoice Processing) to describe the step.

Flow Arrow

Intra Integration Process - A input or Output to some other process within the same capability

Output Documents - An electronic document that is created by the process and can be printed (for example – any kind of report).

Role

Swim lanes used to indicate which user role has <u>primary responsibility</u> for performing steps in the process. If an activity involves participation by more than one role, place it in the swim lane for the role with primary responsibility, or put it on the line that divides both roles.

PO- Manage Sourcing – Create RFX Bid Event

DGS or Solicitation and Contract Buyer

- Receive requisition
- Create the RFX Bid Event.
- Need Collaboration?
  - No → Event Approval
  - Collaborators Check Out, Edit, Check in Event
- Buyer Reviews, Accepts Edits, and Sends for Approval
- Event Approval
- Post Event and notify bidders
- Advertising Required ?
  - Yes → Post Advertisement on CSCR
  - No → Bidder conference required?
- Bidder conference required?
  - Yes → Conduct bidder's conference
  - No → Addendum required?
- Bid Event Addendum
- Addendum required?
  - Yes → Bid Event Addendum
  - No → Responses
- Responses

Bidder

- Receive bid invitation
- Submit bid responses outside the system

FISCal
Financial Information System for California

Collaborator

Collaborators: Edit and save document

Collaboration is done outside of FI$Cal

Yes

Solicitation and Contract Buyer

A

Buyer Create, Edit and save Solicitation Package outside of FI$Cal

Collaboration?

No

Attach document to the bid event within FI$Cal

B

FI$Cal
The Next Generation
Financial Information System for California

PO- Manage Sourcing – Bid Event Addendum

DGS or Solicitation and Contract Buyer

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( Bid Event Addendum ) → < Bid Event document Addendum > → [ Create a new version of the Bid Event, make necessary changes and Save. ]

[ Collaborators: Check Out, Edit and Check In bid event. ] ←Yes— < Collaboration? > —No→ [ Post new version of Bid Event. ] → ( Bid Event Addendum )
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FI$Cal
Financial Information System for California